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State Overview

IDAHO'S UNEMPLOYMENT RATE INCREASES TO 5.2 PERCENT

Idaho's seasonally adjusted unemployment rate for October 2004 was 5.2 percent, up from 5.0 percent for September. This is the 18th consecutive month Idaho's unemployment rate has been less than the national average, which was 5.5 percent for October.

Idaho's *Civilian Labor Force* increased from 708,700 people in September to 710,500, even though there was also an increase of 1,400 unemployed individuals. *Total Employment* in October increased by 400 from September. The year-over-year changes followed the same dynamic: an increase in the *Civilian Labor Force* (by 15,900) resulted even though the number of unemployed individuals also increased (by 600). This suggests that new entrants or re-entrants to the *Labor Force* generally found jobs as the Idaho economy continued to expand.

October is a transition month for Idaho's agricultural labor force but the net effect is that the number of hired workers reaches its seasonal high. The number of irrigators and crop-growing workers decreases as

harvest activities reach a peak. The potato harvest starts to wind down just as the sugar beet harvest gets started. Not only are field harvest workers in demand, but truck drivers, warehouse workers (sorting and packing jobs), and food processors fill the employment ranks.

Seasonal job losses occur because of the colder weather and the end of summer jobs. Cold, wet weather affects road construction, and recreation and tourism-related jobs typically experience a lull between summer and winter activities. Students return to school and their jobs—life guards at swimming pools, lawn care workers, and camp counselors, for example—often are not refilled.

OPINIONS COUNT AT DIRECTOR'S FORUM

Idaho citizens are invited to provide input on Idaho's 2005 plans and priorities for economic, community and workforce development; employment services, international trade, science and technology, and tourism promotion. The event, led by the agency director, Roger B. Madsen, takes place:

January 27, 2005 • Noon to 5 p.m.

Doubletree Boise Riverside Hotel • 2900 Chinden Boulevard
Boise

Participation is limited to 200 so register early. To receive a registration packet, call Carol Ryan at 208-344-2650 x2122 or send an e-mail to carol.ryan@business.idaho.gov.



AREA AND COUNTY LABOR FORCE DEVELOPMENTS

Three counties experienced double-digit, seasonally adjusted unemployment rates in October. Adams County, at 14.8 percent, once again had the highest county unemployment rate in the state. The county's rate increased from 14.2 percent in September, but decreased substantially from the 22.8 percent rate of October 2003. However, the lower unemployment rate was due to a 19 percent drop (335 people) in the *Civilian Labor Force* rather than any significant economic improvement. Payette County has experienced some relatively large layoffs in recent months, and the 12.7 percent unemployment rate is due to an increase in unemployment. Washington County had a 10.6 percent unemployment rate in October, compared to 9.1 percent

in September and 12.9 percent in October 2003. In addition to being a sparsely populated county in which small numerical changes in the labor force components can result in relatively large swings in the unemployment rate, Washington County has been adversely affected by the decline in Idaho's forest products industries. These three counties are stacked along the Idaho-Oregon border segment known as Hells Canyon, which creates a natural barrier to the west, so labor market conditions in one of these counties can affect those in the other two.

Five counties had October unemployment rates that were below 3.0 percent. Madison and Owyhee Counties each had a 1.9 percent unemployment rate. Oneida County had a 2.6 percent unemployment rate, and Franklin and Lewis Counties each had 2.8 percent unemployment rates. Oneida and Franklin Counties abut the Utah border in Southeastern Idaho, and have similar agricultural and tourism economic characteristics. The other three counties are not close to one another, have different economic bases, and have small workforces. Madison County might be an exception to the size factor, but it is the site of BYU-Idaho with a fall 2004 enrollment of 11,555, which is an overriding factor.

Among the state's Labor Market Areas (LMA), two had unemployment rates that were considerably above those of the other areas. The Cassia-Minidoka LMA had the highest rate at 8.0 percent and the Idaho-Lewis LMA followed with a 7.8 percent rate. These two areas have had the highest LMA unemployment rates for most of 2004, although they often trade off being the area with the state's highest rate. Although the combined number of unemployed persons doesn't total much more than 2,000, the high and persistent unemployment rates are indicative of the labor market conditions in these areas. There is some possible relief in sight for the Cassia-Minidoka LMA as local officials have been aggressively marketing the area's labor market attributes and have successfully attracted some new businesses to the area.

Two labor market areas, Bonneville and Magic Valley, had the lowest LMA unemployment rates in October with 4.0 percent each. These two areas have had the lowest rates throughout the year. Agriculture is the mainstay industry in these areas, but the local economies have become increasingly diverse in recent years and have experienced significant population growth.

The Boise City Metropolitan Statistical Area (MSA) had an October unemployment rate of 4.8 percent, the same as for September. Year-over-year, the MSA's number of unemployed did not change much, but the number of employed increased by 9,700 people.

NONFARM PAYROLL JOBS

There were 700 fewer *Nonfarm Payroll Jobs* in October than in September for a 0.1 percent decline. This marginal job loss was the first since July 2004, the only other time so far this year there has been a month-over-month job loss. Except for two sectors that experienced normal, seasonal changes—*Leisure & Hospitality* and *Fruit & Vegetable Preserving & Specialty Foods*—the monthly industry gains and losses were slight and almost offsetting. The *Goods-Producing Industries* had a net decline of 200 jobs while the *Service-Providing Industries* lost 500 jobs.

A few noteworthy month-over-month changes include:

- *Mining's* job losses most likely occurred in the sand and gravel mining component because road construction and repair decline as cold weather sets in.

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IDAHO EMPLOYMENT is produced by Idaho Commerce & Labor which is funded at least in part by federal grants from the United States Department of Labor. Costs associated with this specific publication are available by contacting Idaho Commerce & Labor. Questions and comments can be directed to Public Affairs by phoning (208) 332-3570, ext. 3220, or by e-mail to:

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or to the Regional Labor Economists noted in each area news section.

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- The number of jobs in *Logging and Sawmills & Wood Preservation* industries did not change.
- *Computer & Electronic Product Manufacturing* experienced another consecutive month of stable employment, although there are widespread expectations this industry will benefit from the national recovery in business investments. This has not happened yet in terms of Idaho jobs.
- *Fruit & Vegetable Preserving & Specialty Foods* lost 300 jobs as processors cut back their demand for temporary, seasonal workers for the fruit and table vegetable harvest. The potato harvest was nearly complete and the sugar beet harvest was underway.
- Seasonal factors caused the reductions in the *Leisure & Hospitality* industries. In Idaho's tourism and recreational circles, October to November is known as "slack."
- Schools completed their staff hiring for the 2004-05 school year. College students were on the job with work-study assignments and part-time jobs.

The year-over-year changes in Idaho's industry employment structure were almost all positive and fairly robust in terms of percentage growth. In the last 12 months, Idaho added 19,900 jobs for a 3.4 percent growth rate. This rate was the second highest in the nation for the October 2003 to October 2004 period. Nevada ranked first in percentage gain (+ 4.9 percent) and Utah third (+ 3.1 percent). Since January 2004, it is estimated Idaho has added 38,400 new *Nonfarm Payroll Jobs*. The soft spots in this growth pattern continue to be *Food Manufacturing* and *Local Government*. *Food Manufacturing* has been losing jobs over the last few years due to changing consumer demand, aging processing facilities, transportation costs, and nationwide import/export imbalances. *Local Government* has had to cope with increased costs with no increase in budgets and revenues.

A Look at Retail Trade

December seems an appropriate time to consider *Retail Trade* and its presence in the Idaho economy. An additional article on this industry appears in the *FYI* section (pages 21 to 25). Some of *Retail Trade's* characteristics in Idaho follow:

- There were approximately 73,000 jobs in the *Retail Trade* industries in Idaho during 2003.
- *Retail Trade* job growth outpaced population growth in the mid-1990s, but lagged it from 1998-1993. There was a tremendous buildup of shopping facilities in major Idaho cities, such as Twin Falls and Coeur d'Alene. This further defined these cities as regional trade centers.

State Table 1: October 2004 Labor Force (preliminary)

Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
Seaport LMA	35,491	1,580	4.5	33,911
Nez Perce County	22,986	912	4.0	22,074
Asotin County, WA	12,505	668	5.3	11,837
Boise City MSA	255,860	12,379	4.8	243,481
Ada County	182,872	7,584	4.1	175,288
Canyon County	72,988	4,795	6.6	68,192
Pocatello City MSA*	40,897	2,044	5.0	38,853
Bonneville LMA	87,200	3,489	4.0	83,711
Bingham County	23,094	1,086	4.7	22,008
Bonneville County	51,750	1,835	3.5	49,915
Butte County	1,596	60	3.7	1,536
Jefferson County	10,760	508	4.7	10,252
Cassia-Minidoka LMA	18,995	1,520	8.0	17,475
Cassia County	9,565	642	6.7	8,923
Minidoka County	9,430	877	9.3	8,552
Idaho-Lewis LMA	8,292	647	7.8	7,645
Idaho County	6,786	605	8.9	6,181
Lewis County	1,506	42	2.8	1,464
Panhandle LMA	97,711	6,614	6.8	91,097
Benewah County	4,478	423	9.4	4,055
Bonner County	19,023	1,354	7.1	17,670
Boundary County	4,683	346	7.4	4,337
Kootenai County	63,069	3,884	6.2	59,185
Shoshone County	6,458	607	9.4	5,851
Magic Valley LMA	59,177	2,346	4.0	56,831
Gooding County	8,250	295	3.6	7,955
Jerome County	11,041	450	4.1	10,591
Twin Falls County	39,886	1,600	4.0	38,285
Adams County	1,740	257	14.8	1,483
Bear Lake County	3,146	133	4.2	3,012
Blaine County	12,727	449	3.5	12,278
Boise County	2,665	176	6.6	2,489
Camas County	505	33	6.5	472
Caribou County	3,539	243	6.9	3,295
Clark County	623	51	8.1	572
Clearwater County	3,428	336	9.8	3,091
Custer County	2,112	144	6.8	1,968
Elmore County	9,700	615	6.3	9,085
Franklin County	6,015	169	2.8	5,846
Fremont County	3,944	246	6.2	3,698
Gem County	5,574	427	7.7	5,147
Latah County	15,712	594	3.8	15,118
Lemhi County	3,950	317	8.0	3,633
Lincoln County	2,211	126	5.7	2,086
Madison County	10,889	204	1.9	10,684
Oneida County	1,900	50	2.6	1,851
Owyhee County	4,250	83	1.9	4,167
Payette County	9,626	1,218	12.7	8,408
Power County	3,038	286	9.4	2,752
Teton County	4,134	151	3.6	3,983
Valley County	3,761	294	7.8	3,467
Washington County	4,045	429	10.6	3,616
State of Idaho	710,476	36,981	5.2	673,495
Idaho Cities				
Boise	115,986	4,855	4.2	111,131
Coeur d'Alene	22,268	1,061	4.8	21,207
Idaho Falls	31,409	1,189	3.8	30,220
Lewiston	19,665	690	3.5	18,975
Nampa	22,361	1,638	7.3	20,724
Pocatello	28,839	1,445	5.0	27,394
Twin Falls	20,741	892	4.3	19,849

* Pocatello MSA includes all of Bannock County.

- In current dollars, the value of production/output of *Retail Trade* was \$3.877 million, which was 10.5 percent of Idaho's Gross State Product.
- Employees in covered *Retail Trade* earned \$1,559,486,541 in 2003.
- The 2003 average wage per employee in *Retail Trade* was \$21,324 per year. The average wage for all employees in all covered employment was \$28,667 per year. Therefore, the average *Retail Trade* wage was 74.4 percent of the average for all workers.
- The value of all retail sales in Idaho in 2003 was \$21.694 billion. Sales tax collected on these sales was \$654,613,847.

In the 1998 to 2003 time span, the number of workers (covered employment) in *Retail Trade* increased by 3,480 for a 5.0 percent growth rate. The number of employers (or business establishments), however, did not change at all. State Table 2 provides a correlation between Idaho's population growth and retail trade growth for the periods of 1993 through 1998, compared to 1993 through 2003.

State Table 2: Population and Retail Trade Employment				
	1993	1998	1993 - 1998	1998 - 2003
Total Population	1,108,768	1,252,330		1,366,332
% Change			12.9	9.1
Retail Trade (Nonfarm Jobs)	57,762	69,181		72,427
% Change			19.8	4.7
Retail Trade (Covered Employment)	58,135	69,652		73,132
% Change			19.8	5.0
Source: Idaho Commerce and Labor, November 2004				

State Table 5 on page 26 shows there were changes in the type of retail trade businesses from 1998 through 2003; some types of retail trade had large percentage changes in the number of employees. Food and beverage stores declined both in the number of employers (stores) and workers. Grocery stores have closed and merged. Employment per store often has decreased, but another common trend has been to reduce the shift hours of workers. (Another factor in the mix change is the introduction of Wal-Mart/Fred Meyer-type "superstores," which might change the industry designation of a business from *Food & Beverage* to *General Merchandise*.)

Within the *Retail Trade* supersector, four sectors stand out because of their relatively large share of average employment and number of business establishments / employers.

Motor Vehicle & Parts Dealers. Large dealers will have service personnel, but this sector does not include motor

vehicle repair shops. What contributes to this sector's size is its wide geographical dispersion because almost every town has at least a used car lot. This sector has the highest percentage of businesses in *Retail Trade*.

Building Material & Garden Equipment & Supplies Dealers. This sector includes lumberyards, paint and hardware stores, and nurseries. It also includes home centers, which often are big box retailers of multiple types of building and household supplies. (See "What Characterizes a Big Box Retailer?" on page 23.)

Food & Beverage Stores. This sector had 17.5 percent of the *Retail Trade* employment in 2003. However, this percentage is a significant decline from the 22.4 percent share of 1998. The number of business establishments also declined. Some of this decline might be non-economic. Under the NAICS industry classification structure Idaho Commerce & Labor uses, convenience stores without gas pumps are included in the *Food & Beverage* industry. Convenience stores with gas pumps are a part of the *Gasoline Stations* industry. Under the former SIC industry classification system, convenience stores with gas pumps could be classified as food and beverage stores if the non-gasoline sales were more than gasoline sales.

General Merchandise Stores had 20.7 percent of *Retail Trade* employment in 2003, but only 4.3 percent of the retail store employment total. These are stores that sell a wide variety of products from a single location, but usually from different departments. Sears, JC Penney, K-Mart, Wal-Mart, Costco, and Fred Meyer are familiar names to Idaho shoppers and are examples of *General Merchandise Stores*. These big box operations have many employees, but are selectively located around the state.

In 2003, there were 192 *Nonstore Retailers*. These types of businesses sell items such as heating oil through catalogs, vending machines, Internet, and home delivery. Electronic commerce certainly has been established as a mainstream way of doing business. Retail business is a very visible part of the e-world. For some retailers, the on-line system is just another point of sale in their store, catalog, and electronic ordering retailing system. For others, the Internet, mail-order, or advertising direct response is an exclusive method of selling. In Idaho, there were 40 businesses and 444 employees engaged in this type of selling during 2003.

For Part II of the Retail Trade picture in Idaho, please see the FYI section beginning on page 21.

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State Table 3: Nonfarm Payroll Jobs

	% Change From				
BY PLACE OF WORK	Oct 2004*	Sep 2004	Oct 2003	Last Month	Last Year
Nonfarm Payroll Jobs**	599,600	600,300	579,700	-0.1	3.4
GOODS-PRODUCING INDUSTRIES	110,300	110,500	104,600	-0.2	5.4
Natural Resources & Mining	4,500	4,600	4,100	-2.2	9.8
Logging	2,600	2,600	2,200	0.0	18.2
Mining	1,900	2,000	1,900	-5.0	0.0
Metal Ore Mining	500	500	500	0.0	0.0
Construction	43,900	43,900	38,800	0.0	13.1
Manufacturing	61,900	62,000	61,700	-0.2	0.3
Durable Goods	38,300	38,400	37,600	-0.3	1.9
Wood Product Manufacturing	7,300	7,400	7,100	-1.4	2.8
Sawmills & Wood Preservation	3,000	3,000	2,900	0.0	3.4
Veneer & Engineered Products	1,200	1,300	1,200	-7.7	0.0
Other Wood Product Manufacturing	3,100	3,100	3,000	0.0	3.3
Fabricated Metal Product Manufacturing	3,600	3,700	3,600	-2.7	0.0
Machinery Manufacturing	2,700	2,700	2,500	0.0	8.0
Computer & Electronic Product Manufacturing	17,000	17,000	16,300	0.0	4.3
Transportation Equipment Manufacturing	2,100	2,000	2,100	5.0	0.0
Other Durable Goods	5,600	5,600	6,000	0.0	-6.7
Nondurable Goods	23,600	23,600	24,100	0.0	-2.1
Food Manufacturing	15,900	15,900	16,200	0.0	-1.9
Fruits & Vegetable Preserving & Specialty	7,400	7,700	7,800	-3.9	-5.1
Paper Manufacturing	1,700	1,600	1,600	6.3	6.3
Printing & Related Support Activities	1,900	1,900	2,000	0.0	-5.0
Chemical Manufacturing	1,800	1,800	1,800	0.0	0.0
Other Nondurable Goods	2,300	2,400	2,500	-4.2	-8.0
SERVICE-PROVIDING INDUSTRIES	489,300	489,800	475,100	-0.1	3.0
Trade, Transportation, & Utilities	118,700	118,700	116,200	0.0	2.2
Trade	99,200	99,300	96,900	-0.1	2.4
Wholesale Trade	24,800	24,900	24,100	-0.4	2.9
Wholesalers, Durable Goods	11,400	11,500	11,000	-0.9	3.6
Wholesalers, Nondurable Goods	11,100	11,100	11,100	0.0	0.0
Retail Trade	74,400	74,400	72,800	0.0	2.2
Motor Vehicle and Parts Dealers	11,100	11,200	11,000	-0.9	0.9
Building Material and Garden Equipment	8,200	8,400	7,600	-2.4	7.9
Food & Beverage Stores	11,800	12,000	12,400	-1.7	-4.8
General Merchandise Stores	15,900	15,800	15,200	0.6	4.6
Transportation, Warehousing, & Utilities	19,500	19,400	19,300	0.5	1.0
Utilities	1,800	1,900	1,800	-5.3	0.0
Transportation & Warehousing	17,700	17,500	17,500	1.1	1.1
Rail Transportation	1,100	1,100	1,200	0.0	-8.3
Truck Transportation	8,900	8,900	8,600	0.0	3.5
Information	9,200	9,300	9,100	-1.1	1.1
Telecommunications	3,500	3,500	3,200	0.0	9.4
Financial Activities	27,800	27,900	27,200	-0.4	2.2
Finance & Insurance	20,500	20,500	20,200	0.0	1.5
Real Estate & Rental & Leasing	7,300	7,400	7,000	-1.4	4.3
Professional & Business Services	77,200	77,300	71,900	-0.1	7.4
Professional, Scientific, & Technical	30,400	30,200	29,100	0.7	4.5
Scientific Research & Development	7,500	7,400	7,200	1.4	4.2
Management of Companies & Enterprises	7,500	7,500	7,400	0.0	1.4
Administrative & Support & Waste Management	39,300	39,600	35,400	-0.8	11.0
Administrative & Support Services	38,100	38,400	34,400	-0.8	10.8
Educational & Health Services	66,400	65,700	64,200	1.1	3.4
Educational Services	8,100	7,500	7,700	8.0	5.2
Health Care & Social Assistance	58,300	58,200	56,500	0.2	3.2
Hospitals	13,200	13,300	13,300	-0.8	-0.8
Leisure & Hospitality	54,300	58,000	53,400	-6.4	1.7
Arts, Entertainment, & Recreation	6,700	8,200	6,900	-18.3	-2.9
Accommodation & Food Services	47,600	49,800	46,500	-4.4	2.4
Accommodation	7,600	8,500	7,500	-10.6	1.3
Food Services & Drinking Places	40,000	41,300	39,000	-3.1	2.6
Other Services	18,500	18,700	18,200	-1.1	1.6
Total Government	117,200	114,200	114,900	2.6	2.0
Federal Government	14,000	14,500	13,700	-3.4	2.2
State & Local Government	103,200	99,700	101,200	3.5	2.0
State Government	33,100	31,400	30,000	5.4	10.3
State Government Education	15,500	14,100	15,000	9.9	3.3
State Government Administration	17,600	17,300	15,000	1.7	17.3
Local Government	70,100	68,300	71,200	2.6	-1.5
Local Government Education	36,000	33,500	36,200	7.5	-0.6
Local Government Administration	31,100	31,800	32,000	-2.2	-2.8
Local Government Tribes	3,000	3,000	3,000	0.0	0.0

*Preliminary Estimate

** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State Table 4: Economic Indicators

	Oct 2004	Sep 2004	Oct 2003	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	710,500	708,700	694,600	0.3	2.3
Unemployment	37,000	35,600	36,400	3.9	1.6
Percent of Labor Force Unemployed	5.2	5.0	5.2		
Total Employment	673,500	673,100	658,200	0.1	2.3
<i>Unadjusted</i>					
Civilian Labor Force	709,400	710,400	693,800	-0.1	2.2
Unemployment	30,600	28,900	29,800	5.9	2.7
Percent of Labor Force Unemployed	4.3	4.1	4.3		
Total Employment	678,800	681,500	664,000	-0.4	2.2
U. S. UNEMPLOYMENT RATE ⁽²⁾					
	5.4	5.4	6.1		
U.S. CONSUMER PRICE INDEX ⁽²⁾					
Urban Wage Earners & Clerical Workers (CPI-W)	186.5	185.4	180.7	0.6	3.2
All Urban Consumer (CPI-U)	190.9	189.9	185.0	0.5	3.2
AGRICULTURE					
Agriculture Employment	51,590	45,100	48,460	14.4	6.5
Operators	9,740	9,740	9,010	0.0	8.1
Unpaid Family	360	360	360	0.0	0.0
Hired Workers	41,490	35,000	39,090	18.5	6.1
UNEMPLOYMENT INSURANCE					
<i>Claims Activities</i>					
Initial Claims ⁽³⁾	7,811	5,861	10,960	33.3	-28.7
Weeks Claimed ⁽⁴⁾	37,746	39,652	64,209	-4.8	-41.2
<i>Benefit Payment Activities⁽⁵⁾</i>					
Weeks Compensated	29,750	31,711	52,750	-6.2	-43.6
Total Benefit \$ Paid	\$6,456,392	\$6,744,902	\$11,724,796	-4.3	-44.9
Average Weekly Benefit Amount	\$217.02	\$212.70	\$222.27	2.0	-2.4
Covered Employers	43,491	43,168	41,509	0.7	4.8
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$165,252,913	\$170,521,318	\$218,551,345	-3.1	-24.4

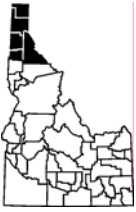
(1) Preliminary Estimate

(2) Source: U.S. Bureau of Labor Statistics

(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims

(4) Includes all entitlements/programs, Intrastate and Interstate Agent

(5) Includes all entitlements/programs, Total Liable Activities



PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

EMPLOYMENT TRENDS

The Panhandle's seasonally adjusted unemployment rate edged up from 6.7 percent in September to 6.8 percent in October. Construction and tourism activities soared to all-time highs this summer, so when those industry sectors began shedding jobs as they normally do in the fall, more people became unemployed than in the past. So, ironically, the increase in unemployment was largely due to the economy's strength. That strength resulted in the unemployment rate's decrease from 7.4 percent in October 2003 to 6.8 percent a year later, and in 5,740 Panhandle residents finding employment during the 12-month period of October 2003 to October 2004. Many communities in the U.S. would be extremely envious of the Panhandle's success. While *Total Employment* increased 1.2 percent in the United States during that 12-month period, it increased 6.7 percent in the Panhandle. No major industrial sector lost jobs in the Panhandle during that period, as shown in Table 1.

AREA DEVELOPMENTS

Benewah County

- Daisy's Gift Shop recently opened at 913 South Main Avenue in St. Maries. Owned by James and Sylvia Smallwood, the shop sells greeting cards, seasonal items, furniture, DVDs, videos, and a wide variety of gift items. It also will serve as an eBay outlet, helping local residents sell items on eBay.
- Lawrence and Jackie Duffy have turned their hobbies into a business. They recently opened Northwest Rustic Pine Creations at 35 South Fern in Fernwood, a village 17 miles south of St. Maries. The gift store features gifts hand-crafted by the couple and others, including decorative birdhouses, wreaths, wall hangings, baby quilts, afghans, and hand-painted signs.

Bonner County

- When the Bonner County Economic Development Corporation (BCEDC) hosted its annual open house November 11, it recognized Sandpoint-based Unicep Packaging as Bonner County's Business of the year. Unicep Packag-

Panhandle Table 1: Labor Force & Employment

	Oct 2004*	Sep 2004	Oct 2003	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	97,710	97,880	92,180	-0.2	6.0
Unemployed	6,610	6,540	6,820	1.1	-3.1
% of Labor Force Unemployed	6.8	6.7	7.4		
Total Employment	91,100	91,340	85,360	-0.3	6.7
Unadjusted					
Civilian Labor Force	96,620	98,020	91,000	-1.4	6.2
Unemployed	5,200	4,760	5,310	9.2	-2.1
% of Labor Force Unemployed	5.4	4.9	5.8		
Total Employment	91,420	93,260	85,690	-2.0	6.7
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	74,820	75,730	71,630	-1.2	4.5
Goods-Producing Industries	15,330	15,480	14,380	-1.0	6.6
Natural Resources & Mining	1,680	1,690	1,540	-0.6	9.1
Construction	6,320	6,500	5,700	-2.8	10.9
Manufacturing	7,330	7,290	7,140	0.5	2.7
Wood Product Manufacturing	2,800	2,790	2,760	0.4	1.4
Other Manufacturing	4,530	4,500	4,380	0.7	3.4
Service-Providing Industries	59,490	60,250	57,250	-1.3	3.9
Trade, Transportation, & Utilities	14,260	14,220	13,730	0.3	3.9
Wholesale Trade	1,520	1,530	1,380	-0.7	10.1
Retail Trade	10,840	10,790	10,560	0.5	2.7
Utilities	390	390	400	0.0	-2.5
Transportation & Warehousing	1,510	1,510	1,390	0.0	8.6
Information	1,100	1,090	1,100	0.9	0.0
Financial Activities	3,210	3,230	3,030	-0.6	5.9
Professional & Business Services	7,030	7,260	6,560	-3.2	7.2
Educational & Health Services	7,240	7,220	6,900	0.3	4.9
Leisure & Hospitality	9,110	9,930	8,710	-8.3	4.6
Other Services	2,250	2,290	2,250	-1.7	0.0
Government Education	5,320	4,860	5,200	9.5	2.3
Government Administration	8,700	8,830	8,570	-1.5	1.5
Government Tribes	1,270	1,320	1,200	-3.8	5.8

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

ing, founded in 1991 by John Snedden to make dental products, has expanded considerably during the last three years, as its one-dose plastic applicators are used for a growing number of medical, cosmetic, and industrial uses. Its employment has increased four-fold—from 30 in early 2002 to more than 120 today. When he received Unicep's award, John Snedden spoke about the benefits of living in a community with so many innovative entrepreneurs, including Dennis Pence of Coldwater Creek, Doug and Ed Hawkins of Litehouse, and Carl Diedrich of Diedrich Coffee Roasters. The excellence of their companies and other local companies—including Panhandle State Bank, Riley Creek Lumber, Litehouse Custom Printing, and Thorne Research—serves as a motivator, showing what can be done with vision and execution. He added, "All of us at Unicep are very privileged to have these types of role models that challenge the Unicep Packaging staff to set higher and higher goals."

- The efforts of BCEDC to recruit new business and help existing businesses expand, along with the successes of local entrepreneurs, have allowed Bonner County to create hundreds of high-paying jobs during the last three years. Since the first quarter of 2001, BCEDC clients have added 349 jobs—making up one in three of the jobs added in the county— and pay an average annual wage of \$35,600, compared to \$24,700 for all jobs in Bonner County. The county's success is especially evident when compared to the national experience. While U.S. manufacturing employment fell 16.1 percent, losing 2.7 million jobs, between the first quarter of 2001 and the first quarter of 2004, Bonner County manufacturing employment increased 21.4 percent from 1,545 to 1,876 workers.
- Schweitzer Mountain Resort, overlooking Lake Pend Oreille from a mountain near Sandpoint, enjoyed its most successful summer season ever in 2004, and expects a record winter season if the weather is cooperative. In the last three years, Schweitzer averaged about 215,000 skier visits per year. With all the national attention Schweitzer and Sandpoint have received during the last year, including an upcoming article about Schweitzer in *The Northwest Meeting & Events* trade magazine, the resort expects to host many more skiers over the next few years. Currently, Schweitzer employs 75 people year-round and more than 600 people during the ski season. Schweitzer is about half way through its 10-year master expansion plan. Since Seattle-based Harbor Resorts purchased Schweitzer in December 1999, it has spent \$25 million to develop the resort.
- Dan and Melanie Lister currently are expanding the Sears store at the Bonner Mall in Ponderay, annexing an adjacent 14,000-square-foot space formerly occupied by Home Appliance and Electronics. This will increase the store's size from 10,800- to 24,000-square feet, allowing it to expand its hardware and appliance offerings. The store soon will feature a kiosk where customers can order any Sears products they want. When the expanded store opens in January, it will become the largest dealer-owned Sears store in the nation.
- Gary Paul Linrette recently opened Wigley's Café and Bakery at 315 Church Street in Sandpoint. As well as selling a full range of breads, cakes, and other baked goods, Wigley's serves Cajun dishes, bratwurst, sushi, a variety of sandwiches, and espresso.

Boundary County

- Riley Creek Lumber eliminated the third shift at its Moyie Springs plant in late November, putting about 30 people out of work. A lack of suitable timber forced the layoff at the mill, which Riley Creek purchased from Louisiana-Pacific in the fall of 2003. The mill, which employed about 160 people following the layoff, remains the largest manufacturing operation in Boundary County. As soon as it announced the layoffs in mid-November, Riley Creek began working with the Bonners Ferry office of Idaho Commerce & Labor to

ease the transition for the laid-off workers. Riley Creek also began making improvements to the mill's dry kiln to allow it to process a wider variety of tree species. This will increase the mill's long-term viability.

Kootenai County

- The long-awaited opening of the Buck Knives plant in Post Falls draws closer. The 102-year-old, family-owned company currently is in the process of hiring 150 people, and soon will bring 50 employees from its current plant in El Cajon, California, to Post Falls. It will begin moving equipment into the \$8 million, 128,000-square-foot plant under construction at Riverbend Commerce Park in mid-December. The new hires will start learning their jobs in early January, and the first knives will roll off the production line at the beginning of March.

Shoshone County

- Lookout Pass Ski Area opened the weekend after Thanksgiving despite low snow levels. A few weeks later the ski area, located along Interstate 90 near the Idaho-Montana border, will unveil its expanded lodge. The \$650,000 expansion added 6,000-square feet to the original 4,600-square-foot lodge. Last winter Lookout introduced a new chairlift and five new runs, more than doubling its skier visits. Last winter, it posted 47,000 skier visits—42 percent were snowboarders. Lookout has received permission from the U.S. Forest Service, which owns the land it's located on, to expand. Next summer it will add five new runs for the next ski season, adding 100 acres of ski-able terrain. About 70 people work at Lookout during ski season.
- Silver Mountain Resort, owned by Oregon-based Eagle Crest Resorts, started its ski season the first weekend in December. Silver Mountain is famous for its gondola—the world's longest—that takes visitors 3.1 miles from Kellogg to the ski area 4,000 vertical feet up. This ski season Silver Mountain has expanded the resort's half-pipe by 300 feet and opened a shuttle from Spokane and Coeur d'Alene to Kellogg, and is lighting the terrain park for night skiing. Eagle Crest's long-term plans for Silver Mountain include the development of a gondola village, a golf course, and a water park. This spring, Eagle Crest began work on Morning Star Lodge—a new condominium and retail complex at the gondola base. Its 64 condo units sold out within the first week they were offered, generating a real estate boom in the Silver Valley. The Morning Star Lodge should be completed by the end of the ski season, which normally ends in early April. Silver Mountain, which hosts more than 85,000 skier visits a year, employs approximately 200 people during the ski season.

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SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

EMPLOYMENT TRENDS

Seaport's seasonally adjusted unemployment rate in October increased to 4.5 percent from September's rate of 4.3 percent. In October 2003 the rate was 4.2 percent. The number of *Non-farm Payroll Jobs* in October remained at the same level as in September. Year-over-year, however, there was a decrease of 580 jobs. The job decrease since last year was mainly a result of decreases in *Professional & Business Services* and *Government*. October is traditionally the month that holiday hiring begins. In October holiday hiring was slow, but is expected to pick up in November.

AREA DEVELOPMENTS

Idaho & Lewis Counties

- In October, the Grangeville City Council approved a \$45,000 loan to the Snowhaven Ski Board to develop a tubing hill. The loan will be used to purchase a lift along with additional equipment. Work began in September on the new tubing hill and should be completed in time to open this season. The Snowhaven Ski Board expects the addition to gross \$30,000 to \$50,000 a season and employ an additional four to five people. "These tubing hills are very popular," said Todd Marek, chair of the board's expansion committee. According to Marek, tubing hills are being recommended as additions to existing ski facilities to improve profits. Marek believes that due to popularity and ease of use, the number of tubers could easily exceed skiers. The loan was authorized out of the city's non-dedicated timber fund, monies which are generated from periodic harvest of municipal land in the nearby watershed. As of September 30, the fund totaled \$279,382.

Seaport Table 1: Labor Force & Employment
Nez Perce County, Idaho and Asotin County, Washington

	Oct 2004*	Sep 2004	Oct 2003	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	35,490	35,900	35,260	-1.1	0.7
Unemployment	1,580	1,540	1,470	2.6	7.5
% of Labor Force Unemployed	4.5	4.3	4.2		
Total Employment	33,910	34,360	33,790	-1.3	0.4
Unadjusted					
Civilian Labor Force	35,130	35,350	34,870	-0.6	0.7
Unemployment	1,350	1,160	1,250	16.4	8.0
% of Labor Force Unemployed	3.8	3.3	3.6		
Total Employment	33,780	34,190	33,620	-1.2	0.5
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	26,230	26,230	26,810	0.0	-2.2
Goods-Producing Industries	4,650	4,690	4,530	-0.9	2.6
Natural Resources & Mining	220	220	240	0.0	-8.3
Construction	1,310	1,290	1,230	1.6	6.5
Manufacturing	3,120	3,180	3,060	-1.9	2.0
Wood Product Manufacturing	560	590	550	-5.1	1.8
Food Manufacturing	70	70	100	0.0	-30.0
Paper Manufacturing	1,160	1,190	1,140	-2.5	1.8
Other Manufacturing	1,330	1,330	1,270	0.0	4.7
Service-Providing Industries	21,580	21,540	22,280	0.2	-3.1
Trade, Transportation & Utilities	5,460	5,440	5,490	0.4	-0.5
Wholesale Trade	620	650	640	-4.6	-3.1
Retail Trade	3,590	3,530	3,560	1.7	0.8
Utilities	90	90	90	0.0	0.0
Transportation & Warehousing	1,160	1,170	1,200	-0.9	-3.3
Information	380	370	380	2.7	0.0
Financial Activities	1,880	1,870	1,840	0.5	2.2
Professional & Business Services	1,340	1,320	1,570	1.5	-14.6
Education & Health Services	4,060	4,030	4,080	0.7	-0.5
Leisure & Hospitality	2,500	2,500	2,530	0.0	-1.2
Other Services	1,080	1,080	1,100	0.0	-1.8
Government Education	2,190	2,260	2,490	-3.1	-12.0
Government Administration	1,880	1,860	1,990	1.1	-5.5
Government Tribes	810	810	810	0.0	0.0

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

- The U.S. Department of Agriculture (USDA) reported that 78 percent of the U.S. winter wheat crop was in good to excellent condition, well above the 48 percent of a year ago. The crop—planted in 18 states during the autumn, is dormant in the winter, and then has a head start when growth resumes in the springtime—is 93 percent planted, according to the USDA. Planting for this region has been completed and fields are in good shape for the winter.

Latah County

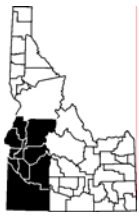
- The University of Idaho Foundation has paid half of the \$26 million debt it incurred in its failed attempt to build the University Place satellite campus in Boise. And if things go as the foundation has planned, the entire debt could be paid off as early as spring 2005. According to foundation officials, a recent flurry of income enabled the foundation to start paying off the debt. The largest chunk of money came in November from a \$5.5 million payment from Idaho State University. The Pocatello school bought a UI satellite campus in Idaho Falls from the foundation. Other money came from the Idaho State Building Authority; contractors who built the Idaho Water Center, the only surviving University Place component, returned about \$4.5 million to the foundation. The final \$3 million came from the sale of the land referred to as the Rite Aid parcel in Boise. The foundation paid \$1.9 million for the land, situated across the street from the Water Center. It was to be used for the two University Place buildings, which were canceled last year.
- Shipping wheat by rail from the Palouse has been assured for another 15 years. The Washington State Department of Transportation (WSDOT) announced an \$8 million purchase in November of the Palouse River and Coulee City (PRCC) Railroad right-of-way and tracks. The PRCC railroad, which had been owned and operated by Kansas-based Watco Inc., runs throughout Latah & Whitman County and into neighboring counties where it connects to national rail lines. Under the agreement reached with Watco, the company will continue to own the trains and railroad cars, and will bill shippers for its services. The line handles about 20 percent of the wheat from the region, and about \$160 million worth of goods are shipped on the railroad each year. In addition to the \$8 million cost of buying the tracks, the state has agreed to spend \$22 million to repair and upgrade the 300 miles of rail lines that make up the PRCC. Watco said two years ago that it couldn't operate at a profit and repair the tracks, which had fallen into disrepair over decades. Company representatives made it clear Watco might be forced to leave the area and tear up the tracks for their salvage value. This led to an 18-month process undertaken by WSDOT to analyze the line, its customers, and the value of saving the railroad.
- The University of Idaho will receive an addition of more than \$10 million in research funding

from a large federal spending bill signed in November. In addition to an award of nearly \$1.2 million for research on canola (a genetic variation of rapeseed developed by Canadian plant breeders for uses such as cooking oil), other beneficiaries at the Moscow University include math, forestry and space research. The Lionel Hampton Artist in Residence and the Lionel Hampton Scholars program at the school were awarded \$400,000.

Nez Perce and Asotin Counties

- The new 100,000-square-foot, three-level Lewis-Clark State College Activity Center is nearing completion. A basketball game January 6 is tentatively scheduled as the first event to be held in the center. The ground was broken on the estimated \$15 million project in August 2003. The activity center is the first phase. Other phases include building additional parking lots, tearing down the old Warrior Gym and its annex, and building an auxiliary gym and classrooms in their places. There is much more to the new activity center than a basketball court. When it's completed, there will be dance and exercise studios, athletic offices, and concession stands that will serve both the activity center and adjacent baseball field. A large room called the Warrior Room will be available for rent during games. It will include sliding glass doors overlooking the basketball court and a door to a roof terrace.
- Thirty-two new homes are being built in the Sundown Heights subdivision south of Lapwai. Construction started in November and the homes, which cost a total of \$3.7 million, and will mark the end of seven years of planning. The final house will be finished by next September. The roads, sewer systems, and streetlights were ready by the end of 2002 at a cost of \$3.5 million. The 100-acre subdivision is designed to accommodate 64 homes.

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TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate in October 2004 was 4.8 percent, up one-tenth of a percent from September 2004, as shown in Treasure Valley Table 1. Despite the slight increase between September and October's unemployment rate, the Boise MSA's unemployment rate is still three tenths of a percent below the unemployment rate in October of one year ago of 5.1 percent. There were 9,700 more people employed in the Boise MSA in October 2004 than in October 2003, and 9,600 more people in the *Civilian Labor Force*. Between September and October 2004 the total number of employed persons increased by 800 which amounts to a 0.3 percent gain in *Total Employment* month-over-month while the *Civilian Labor Force* increased by 1,100 from September to October 2004, a 0.4 percent increase. Since the *Civilian Labor Force* increased more than *Total*

Treasure Valley Table 2: October 2004 Seasonally Adjusted Labor Force Figures for Southwest Idaho Counties				
	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	182,872	7,584	4.1	175,288
Adams	1,740	257	14.8	1,483
Boise	2,665	176	6.6	2,489
Canyon	72,988	4,795	6.6	68,192
Elmore	9,700	615	6.3	9,085
Gem	5,574	427	7.7	5,147
Owyhee	4,250	83	1.9	4,167
Payette	9,626	1,218	12.7	8,408
Valley	3,761	294	7.8	3,467
Washington	4,045	429	10.6	3,616
Statewide	710,476	36,981	5.2	673,495

Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon Counties

	Oct 2004*	Sep 2004	Oct 2003	% Change	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	255,900	254,800	246,300	0.4	3.9
Unemployment	12,400	12,100	12,500	2.5	-0.8
% of Labor Force Unemployed	4.8	4.7	5.1		
Total Employment	243,500	242,700	233,800	0.3	4.1
Unadjusted					
Civilian Labor Force	254,000	252,000	244,300	0.8	4.0
Unemployment	11,200	10,600	11,100	5.7	0.9
% of Labor Force Unemployed	4.4	4.2	4.5		
Total Employment	242,800	241,400	233,200	0.6	4.1
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	242,900	240,000	231,900	1.2	4.7
GOODS-PRODUCING INDUSTRIES	48,300	48,000	45,900	0.6	5.2
Natural Resources & Construction	17,800	17,800	16,300	0.0	9.2
Manufacturing	30,500	30,200	29,600	1.0	3.0
Durable Goods	23,500	23,400	22,500	0.4	4.4
Wood Product Manufacturing	1,800	1,800	1,800	0.0	0.0
Fabricated Metal Products Mfg.	1,500	1,500	1,400	0.0	7.1
Machinery Manufacturing	1,100	1,100	1,100	0.0	0.0
Computer & Electronic Manufacturing	15,400	15,300	14,500	0.7	6.2
Transportation Equipment Mfg.	1,600	1,600	1,600	0.0	0.0
Other Durable Goods	2,100	2,100	2,100	0.0	0.0
Nondurable Goods	7,000	6,800	7,100	2.9	-1.4
Food Manufacturing	5,200	5,000	5,400	4.0	-3.7
Printing & Related Support Activities	700	700	700	0.0	0.0
Other Nondurable Goods	1,100	1,100	1,000	0.0	10.0
SERVICE-PROVIDING INDUSTRIES	194,600	192,000	186,000	1.4	4.6
Trade, Transportation, & Utilities	46,100	45,900	44,200	0.4	4.3
Trade	38,700	38,500	37,100	0.5	4.3
Wholesale Trade	10,300	10,400	9,700	-1.0	6.2
Wholesalers, Durable Goods	6,300	6,300	5,900	0.0	6.8
Wholesalers, Nondurable Goods	3,000	3,100	2,900	-3.2	3.4
Retail Trade	28,400	28,100	27,400	1.1	3.6
Food & Beverage Stores	4,400	4,400	4,300	0.0	2.3
General Merchandise Stores	6,400	6,300	6,000	1.6	6.7
All Other Retail Trade	17,600	17,400	17,100	1.1	2.9
Transportation, Warehousing, & Utilities	7,400	7,400	7,100	0.0	4.2
Utilities	700	700	600	0.0	16.7
Transportation & Warehousing	6,700	6,700	6,500	0.0	3.1
Information	4,200	4,200	3,900	0.0	7.7
Telecommunications	1,500	1,500	1,400	0.0	7.1
Financial Activities	13,100	13,100	12,500	0.0	4.8
Finance & Insurance	9,600	9,700	9,200	-1.0	4.3
Real Estate & Rental & Leasing	3,500	3,400	3,300	2.9	6.1
Professional & Business Services	35,500	34,900	33,300	1.7	6.6
Professional, Scientific, & Technical	11,000	10,900	10,500	0.9	4.8
Management of Companies & Ent.	5,400	5,500	5,600	-1.8	-3.6
Administrative & Support & Waste Mgmt.	19,100	18,500	17,200	3.2	11.0
Educational & Health Services	30,100	29,800	29,200	1.0	3.1
Educational Services	1,500	1,300	2,500	15.4	-40.0
Health Care & Social Assistance	28,600	28,500	26,700	0.4	7.1
Hospitals	9,600	9,600	9,300	0.0	3.2
Leisure & Hospitality	21,500	21,600	20,200	-0.5	6.4
Arts, Entertainment, & Recreation	3,200	3,200	2,700	0.0	18.5
Accommodation & Food Services	18,300	18,400	17,500	-0.5	4.6
Accommodation	2,200	2,300	2,000	-4.3	10.0
Food Services & Drinking Places	16,100	16,100	15,500	0.0	3.9
Other Services	7,100	7,100	6,700	0.0	6.0
Total Government	37,000	35,400	36,000	4.5	2.8
Federal Government	5,700	5,900	5,500	-3.4	3.6
State & Local Government	31,300	29,500	30,500	6.1	2.6
State Government	13,800	13,500	13,600	2.2	1.5
State Government Education	4,300	4,100	4,100	4.9	4.9
State Government Administration	9,500	9,400	9,500	1.1	0.0
Local Government	17,500	16,000	16,900	9.4	3.6
Local Government Education	11,200	9,800	10,700	14.3	4.7
Local Government Administration	6,300	6,200	6,200	1.6	1.6

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Employment during October, the unemployment rate rose slightly. The *Civilian Labor Force* and *Total Employment* figures for October 2004 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 1 on page 11.

From September to October 2004, *Nonfarm Payroll Employment* in the Boise MSA increased by 2,900 jobs, a 1.2 percent increase. Since October of 2003, employment has grown by 4.7 percent, an increase of 11,000 jobs year-over-year.

Between September and October 2004, the *Goods-Producing Industries* increased by 300 jobs. All of the jobs created in the *Goods-Producing Industries* occurred in the *Manufacturing* sector; *Natural Resources, Mining & Construction* employment was unchanged in October from September. Within *Manufacturing*, 100 jobs were added in *Computer & Electronic Product Manufacturing* while the remaining jobs were added in the *Nondurable Goods Manufacturing* sector, in particular *Food Manufacturing* as the harvest season produced another crop to be processed.

October 2004 saw the *Service-Providing Industries* add 2,600 jobs from September and now employs 194,600 people. The increase in employment is a 1.4 percent increase from September 2004, and a 4.6 percent increase over October 2003's employment of 186,000.

Within the *Service-Providing Industries*, employment gains occurred in a number of sectors. *Retail Trade* increased by 1.1 percent to 28,400, a growth of 300 jobs from September, and an increase of 1,000 jobs from October of one year ago. *Professional & Business Services* also had a large gain of 600 jobs in October, an increase of 1.7 percent. A gain of 100 jobs in the *Professional, Scientific & Technical Services* sector was offset by a loss of 100 jobs in the *Management of Companies & Enterprises* sector. All 600 jobs created in the *Professional, Scientific & Technical Services* sector were in *Administrative Support & Waste Management*, which has a typical seasonal increase between September and October. Jobs in October also increased in *Educational & Health Services* as schools started up in the fall and the *Health Care* industry began gearing up for the busier winter season.

The *Government* sector of the *Service-Providing Industries* accounted for the majority of the monthly increase in jobs during October. *Federal Government* employment decreased slightly in Oc-

tober from September, losing 200 jobs, but staying 3.6 percent above levels in October 2003. Jobs in the *State & Local Government* sector of the *Service-Providing Industries* increased by 1,800 from September 2004, for a month-over-month growth rate of 6.6 percent. The majority of these government jobs were added in *Local Government* as 1,500 more jobs were reported in October than in September, a 9.4 percent increase. *Local Government Education* is where most of the jobs were created just as last month the majority of jobs were in *State Government Education*. *State Government* jobs continued to increase although not as fast as in September; 300 jobs were added in October 2004, with 200 in the *Education* sector of *State Government*.

AREA DEVELOPMENTS

Boise MSA

- Golden Corral recently opened its newest location in the Treasure Valley, near the Edwards Theatre in Nampa. The buffet-style family restaurant has over 300 locations across the United States, including a location in Boise.
- Albertson's is moving approximately 170 jobs from Scottsdale, Arizona, to Boise. The jobs are in the company's corporate general merchandise and its health & beauty units. These two units will work at the company headquarters off of Parkcenter Boulevard and should be moved to Boise early in 2005.
- The Milken Institute, which tracks the high tech manufacturing sector, has ranked the Boise MSA 13th in the nation in 2004 up from 72nd in 2003. The rankings are based on job growth, salaries, gross domestic product, and sales from high tech manufacturers.
- According to Micron CEO Steve Appleton, the company is nearly back to its employment level prior to the layoffs that occurred in February 2003. At the company's recent annual shareholder meeting, the CEO also said the markets are improving and moving in Micron's direction, and employment levels have been growing.
- Based on third-quarter 2004 revenue, Micron Technology now shares with Hynix Semiconductor of South Korea the number two spot in the manufacture of memory chips. Both Micron and Hynix had third quarter revenues of \$1.04 billion amounting to a 15.2 percent market

share each. Micron's share is up from second quarter revenues of \$1.02 billion and a 14.9 percent market share while Hynix lost ground in the third quarter from the second quarter when it had revenues of \$1.14 billion and a 16.7 percent market share.

- Jos. A. Bank will be opening its first store in Idaho at the new BoDo development in downtown Boise. Jos. A. Bank offers men's casual and tailored clothing, and will be leasing 5,000-square feet in the development that will also house a 5,500-square foot Ann Taylor Loft women's clothing store.
- Italian restaurant chain Piatti is the latest big name vendor to sign a lease with the new downtown BoDo development. Piatti has several locations in California, as well as locations in Denver, San Antonio, and Seattle.
- Saint Alphonsus Regional Medical Center has recently broken ground on a new 400,000-square foot building to house the Center for Advanced Healing, which will be used for treating critically ill and injured patients. The new building is expected to cost \$161 million and is scheduled to be complete in the summer of 2007.
- At the Boise Metro Chamber of Commerce Economic Outlook Forum good news was predicted about the valley for 2005. Micron Technology has predicted a 45 percent increase in shipments of its products in 2005 over 2004. New businesses are increasing at a rate of 15 percent per year in Idaho, while the national average is only 4.5 percent per year. During the first nine months of 2004, home sales had increased by 13 percent over the same time period one year ago and are expected to continue to increase in 2005.
- An 18-screen movie theater is planned for Meridian located north of Overland Road and east of Locust Grove Road opening in May 2005. Hallett Cinemas announced this project shortly after Edwards Theatres announced its plans to open a 16-screen theater in Meridian in the fall of 2005. The Hallett Cinemas project is estimated to cost between \$10 to 15 million. ZGA Architects of Boise is the designer of the project and Petra Inc., also of Boise, is the general contractor.
- Idaho Power Company is on pace to set a record in 2004 for adding new customers. In 1994 the company set its one-year record for new power customers at 12,536. Through the first three quarters of this year, Idaho Power has added 9,776 new customers. Idaho Power serves customers in both Idaho and Oregon.
- IdaTech, a subsidiary of Ida-Corp, has recently been awarded a \$1.4 million contract from the U.S. Department of Energy. Under the three-year contract IdaTech will be doing research and development of fuel cell systems for heavy construction equipment and farm equipment.
- Carlson Leisure Travel Services, a call center located in the Black Eagle Center in Meridian, has begun hiring 45 additional workers. These people will work from their homes taking inbound phone calls to assist people with their travel reward programs. These new workers will be full-time employees of Carlson Leisure Travel Services and not independent contractors.
- West Coast Hospitality Corp, owner of Red Lion Hotels in the northwest, has announced it is selling seven of its properties, including the Red Lion Parkcenter Suites in Boise. The Red Lion Downtown will not be sold. West Coast Hospitality has said money from the sales will be used for making renovations and improvements at 31 other properties owned by West Coast Hospitality such as new beds and updated bathrooms.
- Zions Bank has recently opened in its newest full service branch in Caldwell as the bank continues to expand in the Treasure Valley. For the last three consecutive years Zions Bank has been the top lender of Small Business Administration loans in the Boise district.
- Washington Group International (WGI) has recently entered into a partnership with RATP Development to explore passenger rail operations in the United States. RATP is a large Transportation Company from France that operates railways and bus routes in that country, serving over nine million passengers each day.
- Boise based WGI, which won contracts for reconstruction of Iraq worth \$3 billion, has only received \$500 million of that total. Company

officials cite the increased spending on security in Iraq by the U.S. Government as the reason for the slow payments for construction work. As a result of the delayed funding, WGI's workforce in Iraq is down to 125 people. At one point the company had over 200 employees in Iraq.

- A new furniture store will be opening soon in Meridian. Ennis Fine Furniture is currently remodeling a building next to Lee Read Jewelers formerly occupied by Bellafina. Ennis plans to open the store in February 2005 and will employ approximately 12 people.
- SelEquity Real Estate, a Boise based firm, is opening its first location in Nampa. SelEquity is fixing up the former 20,000-square foot American Image Marketing building and plans to be open by January 1 with 50 realtors.
- Air traffic at the Boise Airport, the nation's 81st busiest airport, was up 11 percent in October from September. This increase was considerably higher than the nationwide average increase of 6.2 percent. October was the eighth straight month that passenger traffic was higher than the same time period of one year ago at the Boise Airport.
- United Water Idaho has asked for a rate increase of 22 percent for residential customers and 20 percent for commercial customers. United Water Idaho serves approximately 75,000 customers in the Boise area and is asking for the rate increases to help cover costs of improvements made to its water system.

WASHINGTON/ADAMS COUNTY

- The Payette National Forest has announced plans to combine the Weiser and Council Ranger Districts. The combining of the two districts comes amid funding shortages in the present and expected future funding shortages. Between the Council and Weiser Ranger Districts, 32 positions will be eliminated while 10 positions will be created for a net loss of 22 jobs.

Elmore County

- Ground has recently been broken on a new Hampton Inn and Suites. The new hotel will be located just off Interstate 84 eastbound Exit 95 behind the Jack In The Box restaurant.

Valley County

- Tamarack Resort has plans for building onsite employee housing as part of its construction plans for 2005. The employee units could house up to eight people each and be able to facilitate a variety of living arrangements. Tamarack has also expressed interest in partnering in efforts to build affordable employee housing off-site.

Boise County

- Boise Cascade is closing its lumber plant in Horseshoe Bend, laying off all 15 employees at Riverbend Lumber Remanufacturing. Reasons for the closure is high transportation costs involved in moving raw goods to the site and shipping finished product from the site, according to company officials. The Horseshoe Bend location will be closed by the end of the year, officials added.

Payette County

- Watermark, a life jacket manufacturer formerly based in Fruitland, has been sold to Stearns, another life jacket manufacture based in Minnesota. The production capacity and brands of Watermark life jackets acquired by Stearns are likely to be outsourced to China.

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MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate was 4.0 percent in October 2004 for the Magic Valley Labor Market Area (LMA) as seen in Magic Valley Table 1. This is one-tenth of a percentage point higher than September 2004, and one-tenth of a percentage point lower than October 2003.

Civilian Labor Force was up 2,620 workers, or 4.6 percent, year-over year. This continues a year-long trend of stable, low unemployment numbers in conjunction with strong increases in the *Civilian Labor Force*, indicating that unemployment rates were a true measure of economic growth rather than a report of fewer people in the workforce.

The employment sector that has shown dramatic growth year-over-year is *Construction* with a 43.7 percent increase. This is particularly noteworthy because all types of construction have increased. The City of Twin Falls set a record for the third consecutive year for new housing starts. This was a result of low interest rates and strong consumer confidence. Business construction was also very robust as well as road and highway construction. Many projects starting in 2004 included ground-breaking for a new Lowe's Store on Blue Lakes Boulevard and North College Road. Also, the Church of Jesus Christ of Latter Day Saints (LDS) began construction of a \$1.4 million Deseret Industries store and office facilities in the Fillmore Street and Pole Line Road area in north Twin Falls. Outlook for construction employment continues to be strong for 2005 with the announcement that a new LDS Temple will be erected at the site of the present Candle Ridge Golf Course. This should create 200-300 additional construction jobs that should last 18-24 months. With the announcement that three new light manufacturers are moving to the area--Kiefer-Built in Gooding, Hilex-Poly in Jerome, and Jayco, Inc. in Twin Falls--there will be construction projects to enhance and modify the buildings to meet specifications.

Magic Valley Table 1: Labor Force & Employment
Twin Falls, Jerome, and Gooding Counties

	Oct 2004*	Sep 2004	Oct 2003	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	59,180	58,040	56,560	2.0	4.6
Unemployment	2,350	2,270	2,320	3.5	1.3
% of Labor Force Unemployed	4.0	3.9	4.1		
Total Employment	56,830	55,770	54,240	1.9	4.8
Unadjusted					
Civilian Labor Force	59,550	59,130	56,900	0.7	4.7
Unemployment	1,930	1,820	1,890	6.0	2.1
% of Labor Force Unemployed	3.2	3.1	3.3		
Total Employment	57,620	57,310	55,010	0.5	4.7
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	47,620	47,220	44,910	0.8	6.0
Goods-Providing Industries	10,200	9,310	7,760	9.6	31.4
Natural Resources & Mining	20	20	20	0.0	0.0
Construction	3,780	4,150	2,630	-8.9	43.7
Manufacturing	6,400	5,140	5,110	24.5	25.2
Food Manufacturing	4,610	3,670	3,510	25.6	31.3
Other Manufacturing	1,790	1,470	1,600	21.8	11.9
Service-Providing Industries	37,420	37,910	37,150	-1.3	0.7
Trade, Transportation & Utilities	10,940	11,180	9,950	-2.1	9.9
Wholesale Trade	2,010	1,990	1,930	1.0	4.1
Retail Trade	6,810	6,820	6,200	-0.1	9.8
Utilities	260	290	270	-10.3	-3.7
Transportation & Warehousing	1,860	2,080	1,540	-10.6	20.8
Information	500	580	490	-13.8	2.0
Financial Activities	1,800	1,830	1,790	-1.6	0.6
Professional & Business Services	6,370	6,100	7,130	4.4	-10.7
Educational & Health Services	4,030	4,090	3,820	-1.5	5.5
Leisure & Hospitality	3,740	3,890	3,830	-3.9	-2.3
Other Services	1,500	1,500	1,500	0.0	0.0
Government Education	3,980	4,180	4,060	-4.8	-2.0
Government Administration	4,560	4,560	4,590	0.0	-0.7

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Manufacturing increased 25.2 percent year-over-year due primarily to strong growth in *Food Manufacturing*. Dairy prices were very strong in 2004, and cheese processors gradually increased their workforces. The expansion of Rite Stuff Foods in Jerome also contributed to the strong numbers. *Manufacturing* job numbers in 2005 are expected to increase, especially as the three light manufacturers mentioned earlier ramp up to expected levels. The three manufacturers are expected to create 200-300 new jobs with good wages and excellent benefits. *Retail Trade & Transportation* also had increases of 9.8 and 20.8 percent, respectively, year-over year. This is noteworthy in the case of *Transportation* because gasoline prices reached record levels of over \$2.00 per gallon before the prices receded slightly toward year-end.

For the most part, agricultural hiring remained average to slightly below average, however water shortages caused seasonal workers to be displaced

two to four weeks earlier than usual. Holiday hiring was strong in western Magic Valley and Blaine County, and better than expected in the Mini-Cassia area, which is still struggling from high unemployment. Again, the dairy industry showed extreme stability and worker numbers rose steadily throughout the year. In the Blaine County area, *Leisure & Hospitality* hiring was better in 2004 and the area had a very low unemployment rate. A relatively good early snow year in January and February 2004 resulted in strong tourism numbers. Despite higher petroleum prices, numbers indicated pre 9/11 levels. The major concerns for the Sun Valley-Ketchum area will be energy prices, especially for automobile tourists, and also flight availabilities into Friedman Airport in Hailey. The overriding concern is the continued drought. The early 2004-2005 season has been relatively dry and if the water year is below average it will have serious ramifications, not only for skiers, but also summer campers as campsite fire danger increases.

The major economic concern locally is water supply and outlook. South Central Idaho has experienced extreme drought conditions for the last five years resulting in critical water concerns and possible mandatory curtailment. An April 1, 2004, curtailment was avoided when a water agreement was met, but this was only temporary at best. The Snake River Aquifer is experiencing water level drop-offs, and this is a serious concern for the aquaculture industry as well as the dairy industry, municipalities, and other groundwater users. The Magic Valley LMA is the leading trout-producing area in the world. Aquifer recharge is a high priority and irrigation water is in short supply due to a below average water year. If agreements can't be reached, the economic impact could be catastrophic, and threaten to undo impressive growth and stability that the area has enjoyed for the last decade.

AREA DEVELOPMENTS

Twin Falls County

- Dell, Inc. sent recruiters to a six-hour session at the College of Southern Idaho to look for potential applicants for its business relationship support center in Twin Falls. This does not signal a major increase in employment numbers, but rather the company's effort to create a strong applicant base for normal operations and attrition needs. Earlier this year, Dell upgraded the Twin Falls consumer technical support call center to a business relationship center. This has provided enhanced career path opportunities and changed hours to fit businesses rather than consumers.
- Blue Lakes Sporting Goods, a long-time Twin Falls retailer, announced that it will close. No exact date was set. Blue Lakes Sporting Goods originally opened in 1962 and expanded into the current building in 1977. Approximately 10 full- and part-time employees will be affected.
- Jayco, Inc., the new recreational vehicle manufacturing locating in Twin Falls, has started its recruitment process to hire workers for the assembly facility to be located in the Norco Building in south Twin Falls. Jayco,

Inc. is one of the largest manufacturers of recreational vehicles in the United States. Headquartered in Middlebury, Indiana, the company manufactures a large variety of recreational vehicles. The company plans to hire local management, and begin hiring welders and assemblers. It is estimated that the company will hire 50-80 workers in 2005.

Blaine, Camas, Gooding, Jerome, and Lincoln Counties

- A Kanawha, Iowa, based trailer manufacturer is opening a plant in Gooding and could create as many as 75 jobs. Kiefer Built LLC plans to lease the 120,000-square-foot Arkoosh Produce Building and to hire as many as 20 employees by March 2005. The company plans to eventually hire 75 welders, assemblers, and maintenance personnel. Wages will be extremely competitive with a full benefits package offered. The recruitment was the result of statewide participation and assistance from Idaho Commerce & Labor personnel from Boise and the Magic Valley Office in close cooperation with Gooding City leaders, economic developers, and the College of Southern Idaho. In addition to providing employment opportunities for workers in western Magic Valley, the building the company is leasing has been vacant for several years.

Cassia and Minidoka Counties

- Groundbreaking for the construction of the new Gossner Foods cheese processing facility began in October 2005. Construction is planned to take about one year and the company hopes to begin processing in October 2005. The construction project will employ close to 100 workers for the year; Gossner plans to hire 30-60 workers initially at extremely competitive wages and full benefits. The company will be located in the new Burley-Heyburn Industrial Park managed by the Boyer Company, and will be a new cornerstone facility in the park.
- After more than a year's work, the City of Burley became a Gem Community. Hank Ebert, Gem Community Coordinator for Idaho Commerce and Labor, presented the award and asked teams from Rupert, Wendell, Heyburn, Albion, and Shoshone to share their experiences with the state's 126th Gem Community. The Gem Community status is an accomplishment that can help a city's resume and indicates strong community support of local projects and economic development. It shows a city's capability and commitment to long-term planning. Projects related to the City of Burley's centennial in 2005 were key to achieving the Gem Community status.

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SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Pocatello Metropolitan Statistical Area (includes all of Bannock County) increased slightly from September to October 2004 to 5.0 percent as shown in Southeast Idaho Table 1. The September 2004 revised rate was 4.7 percent. *Total Employment* declined by 580 in October as seasonal summer jobs in agriculture, recreation, and tourism decreased along with market-adjusted reductions at AMI Semiconductor. The number of unemployed individuals increased by 90 in October to 2,040 from September when it was 1,950. The *Civilian Labor Force* dropped by 490 because many in the labor force were students who returned to school. The area's unemployment rate remained lower than the state's rate of 5.2 percent and the U.S. rate of 5.5 percent.

The October 2004 rate of 5.0 percent was two-tenths of a percentage point higher than the October 2003 rate, which was 4.8 percent.

Southeast Idaho Table 2 shows the October 2004, September 2004, and October 2003 seasonally adjusted unemployment rates for the six remaining counties in Southeast Idaho. Caribou and Oneida Counties were the only counties in the region to experience significant unemployment rate changes over the month. In Caribou County the unemployment rate increased seven-

Southeast Idaho Table 1: Labor Force & Employment
Pocatello City MSA (Bannock County)

	Oct 2004	Sep 2004	Oct 2003	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	40,890	41,380	40,930	-1.2	-0.1
Unemployment	2,040	1,950	1,960	4.6	4.1
% of Labor Force Unemployed	5.0	4.7	4.8		
Total Employment	38,850	39,430	38,970	-1.5	-0.3
Unadjusted					
Civilian Labor Force	40,780	40,810	40,810	-0.1	-0.1
Unemployment	1,830	1,650	1,740	10.9	5.2
% of Labor Force Unemployed	4.5	4.0	4.3		
Total Employment	38,950	39,160	39,070	-0.5	-0.3
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	34,390	34,310	34,510	0.2	-0.3
Goods-Producing Industries	4,150	4,150	4,310	0.0	-3.7
Natural Resources & Mining	10	10	20	0.0	-50.0
Construction	1,760	1,750	1,750	0.6	0.6
Manufacturing	2,380	2,390	2,540	-0.4	-6.3
Food Manufacturing	420	420	420	0.0	0.0
Fabricated Metal Product Manufacturing	120	120	110	0.0	9.1
Machinery Manufacturing	40	40	30	0.0	33.3
Other Manufacturing	1,800	1,810	1,980	-0.6	-9.1
Service-Providing Industries	30,240	30,160	30,200	0.3	0.1
Trade, Transportation & Utilities	6,780	6,750	6,570	0.4	3.2
Wholesale Trade	1,150	1,140	1,030	0.9	11.7
Retail Trade	4,400	4,380	4,350	0.5	1.1
Utilities	40	40	40	0.0	0.0
Transportation & Warehousing	1,190	1,190	1,150	0.0	3.5
Information	660	670	610	-1.5	8.2
Financial Activities	1,910	1,910	1,980	0.0	-3.5
Professional & Business Services	3,840	3,740	4,220	2.7	-9.0
Educational & Health Services	2,800	2,810	2,840	-0.4	-1.4
Leisure & Hospitality	3,290	3,490	3,450	-5.7	-4.6
Other Services	1,080	1,060	1,170	1.9	-7.7
Government Education	5,750	5,570	5,270	3.2	9.1
Government Administration	4,130	4,170	4,080	-1.0	1.2

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Southeast Idaho Table 2: October 2004
Seasonally Adjusted Labor Force Figures for Southeast Idaho Counties

	Oct 2004 Preliminary	Sep 2004 Revised	Oct 2003 Bench- marked
Bear Lake	4.2%	4.3%	5.0%
Bingham	4.7%	4.7%	4.5%
Caribou	6.9%	6.2%	8.8%
Franklin	2.8%	3.0%	2.7%
Oneida	2.6%	2.0%	3.4%
Power	9.4%	9.3%	9.5%

tenths of a percentage point because of decreased agricultural and construction jobs. Oneida County's unemployment rate increased six-tenths of a percentage point because of job reductions outside the county which affected workers in Oneida County.

The number of *Nonfarm Payroll Jobs* increased by 80 between September and October 2004 to 34,390. Changes occurred within individual industries and reflect normal seasonal patterns. The *Goods-Producing Industries*, which include *Natural Resources & Mining*, *Construction* and *Manufacturing*, was unchanged from October to September 2004. Industry-level changes occurred in *Construction*, which increased by ten jobs over the month with gains in *Specialty Trade Contractors* as construction pro-

jects from the busy summer months were in the completion stages. The *Service-Providing Industries* gained 80 jobs and experienced industry-level changes in several categories. Jobs increased in *Wholesale & Retail Trade* (30) and *Business Services, Employment, Temp Help, PEO's* (100) as merchants began preparing for the busy Thanksgiving and Christmas holiday shopping season. Some jobs were also added in *Business Support, Including Call Centers* (10). The largest net gain occurred in *Government Education* (180) and was evenly split between *State & Local Education* as schools adjusted employment to meet enrollments. Seasonal job losses in some industries made up for job gains in others and reflect the seasonality of the area labor force. *Leisure & Hospitality* declined by 200 jobs because the busy summer tourist season ended. Other notable job losses occurred in *Government Administration* (40) as temporary summer parks and recreation jobs ended.

AREA ECONOMIC DEVELOPMENTS

Please note: Information contained in Economic Developments is obtained from area newspapers, local Idaho Commerce & Labor offices, trade publications, local area Chambers of Commerce publications, and other sources.

Bannock County

- After more than two years of planning, Portneuf Medical Center has opened its new Heart and Vascular Center, located at the Medical Center's East Campus in Pocatello.
- Portneuf Medical Center opened an outpatient Physical Medicine Clinic at the location of the former Rite Aide Store on Fifth Avenue and Benton Street in Pocatello.
- Several Pocatello businesses held grand openings of their new facilities.
 - » First American Title built an impressive building at 2240 East Center.
 - » Dr. Kim Smith and Dr. Jeremy Hodge held a grand opening of their new facility, Four Seasons Dental. The business is located at 115 East Chapel Road in Pocatello.
 - » Ideal Audio moved into their new building at 1205 Yellowstone.
 - » Your Valet Cleaners moved into its new facility in the Yellowstone Center in Pocatello. The move was made to be in a more convenient location for the business's customers.
 - » Idaho Unlimited moved into its new location in the U-Join Plaza at 215 East Cedar in Pocatello.
 - » Safari Graphics held a grand opening of its new facility at 705 North Main Street.
 - » Bank of Idaho opened its new facility at 1230 Yellowstone.

- Professional Hearing Aid Services opened at 1448 East Center Street in Pocatello. The owner has similar businesses in Twin Falls and Burley.
- Three new businesses opened in Old Town Pocatello: Kanda's Too at 502 North Main Street, Elegant White Elephant at 150 North Third Avenue, and Jennifer's Children's Shoppe at 200 South Main Street.
- Chubbuck Chiropractic opened at 445 West Chubbuck Road in Chubbuck. The new business specializes in correcting the spine and offers message therapy.
- Maurice's opened in the Pine Ridge Mall in Chubbuck. The business sells quality clothing and is owned by American Retail Group.
- The Lava Fitness Center opened in the basement of the Lava Hot Springs Community Center. The Lava Lions and Lioness club funded the \$45,000 fitness center. It will be operated by the senior's center.

Bear Lake County

- Alish'a Corner Cuts opened at 702 Jackson Street in Montpelier. The shop specializes in colors, highlights, perms, and cuts for the whole family.
- Janice Baird has opened Healing Hands Wellness Center. The business is located at 816 Grant Street in Montpelier. Baird is a national certified Therapeutic Message Therapist.

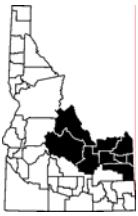
Bingham County

- The Family Dollar Store opened at 67 South West Main Street in Blackfoot. The business offers a full range of household items ranging from \$1.00 to \$10.00.
- A new Sonic Drive-In opened in Blackfoot. The restaurant is the first business to locate in the new Parkway Village business development. It is the first Sonic to have an inside dining area.
- Herrick Floor Coverings opened at 1449 North West Main Street in Blackfoot. Owners Kim and Becky Herrick offer all kinds of flooring and installation.
- A new professional office building is under construction at the corner of Parkway and West Bridge in Blackfoot. The facility will house four businesses and will be ready for occupancy next spring.

Caribou County

- A Family Dollar Store opened in Soda Springs. The new store is located at 156 East Second South. The store carries a full line of household items. It is the seventh Family Dollar Store in Idaho.

Continued on page 26



NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

EMPLOYMENT TRENDS

October's seasonally-adjusted unemployment rate for the Bonneville Labor Market Area (LMA) increased four-tenths of a percentage point over the month to 4.0 percent as seen in Northeast Table 1. The *Civilian Labor Force* decreased by 900 with many people leaving jobs to return to school and agricultural jobs coming to a close at the end of harvest season. However, *Unemployment* increased by 330 people with layoffs prevalent in *Construction*, *Government Administration*, and *Professional & Business Services*. Of the four counties that comprise the LMA, Bingham County was the only one that didn't experience an unemployment rate increase. It remained unchanged from the previous month, but shared the highest rate of the four counties with Jefferson County at 4.7 percent. Year-over-year, all four counties showed increases in the unemployment rate, although Bonneville and Bingham Counties were very slight. The LMA's rate increased two-tenths of a percentage point with the *Civilian Labor Force* showing an increase of 4,170 people and *Unemployment* increasing by 330 people. Idaho Falls, the largest city in the LMA, showed an increase of six-tenths of a percentage point over the month and one-tenth of a percentage point year-over-year to its current 3.8 percent. The unemployment rate for the LMA was 1.2 percentage points lower than the state's rate of 5.2 percent and 1.5 percentage points lower than the national rate of 5.5 percent.

Of the other six counties in Northeast Idaho, five saw unemployment rate increases over the month while Teton County showed a slight decrease. Clark County showed the highest rate at 8.1 percent because a potato processing plant laid off employees for yearly maintenance for a short period at the same time statistics were gathered for calculating the rate. Therefore, the number of unemployed people doubled for the month while the *Civilian Labor Force* in-

Northeast Idaho Table 1: Labor Force & Employment
Bonneville, Bingham, Butte, and Jefferson Counties

	Sep 2004*	Aug 2004	Sep 2003	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	87,200	88,100	83,030	-1.0	5.0
Unemployment	3,490	3,160	3,160	10.4	10.4
% of Labor Force Unemployed	4.0	3.6	3.8		
Total Employment	83,710	84,940	79,870	-1.4	4.8
Unadjusted					
Civilian Labor Force	87,540	89,410	83,250	-2.1	5.2
Unemployment	2,890	3,130	2,640	-7.7	9.5
% of Labor Force Unemployed	3.3	3.5	3.2		
Total Employment	84,650	86,280	80,620	-1.9	5.0
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	67,090	67,570	64,830	-0.7	3.5
Goods-Producing Industries	10,940	11,020	10,380	-0.7	5.4
Natural Resources & Mining	70	70	70	0.0	0.0
Construction	5,660	5,800	5,050	-2.4	12.1
Manufacturing	5,210	5,150	5,260	1.2	-1.0
Food Manufacturing	2,820	2,760	2,950	2.2	-4.4
Fabricated Metal Product Manufacturing	280	280	260	0.0	7.7
Machinery Manufacturing	380	370	390	2.7	-2.6
Other Manufacturing	1,730	1,740	1,660	-0.6	4.2
Service-Providing Industries	56,150	56,550	54,450	-0.7	3.1
Trade, Transportation & Utilities	15,160	15,090	14,670	0.5	3.3
Wholesale Trade	4,810	4,760	4,670	1.1	3.0
Retail Trade	8,440	8,400	8,130	0.5	3.8
Utilities	110	120	110	-8.3	0.0
Transportation	1,800	1,810	1,750	-0.6	2.9
Information	1,050	1,060	970	-0.9	8.2
Financial Activities	2,250	2,260	2,200	-0.4	2.3
Professional & Business Services	12,160	12,300	11,660	-1.1	4.3
Educational & Health Services	6,990	6,980	6,640	0.1	5.3
Leisure & Hospitality	5,460	5,720	5,080	-4.5	7.5
Other Services	2,120	2,180	2,200	-2.8	-3.6
Government Education	4,940	4,560	4,980	8.3	-0.8
Government Administration	6,020	6,410	6,050	-6.1	-0.5

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

creased by approximately 50 people. Year-over-year, the same five counties showed increases in the unemployment rates while Teton County again showed a very slight decrease. As an average, all nine counties in Northeast Idaho show an unemployment rate of 3.9 percent.

Nonfarm Payroll Jobs decreased by 480 over the month. Most of the job losses occurred in the *Service-Providing Industries*. *Government Administration* showed the largest decrease, 390 jobs, with summer seasonal jobs coming to a close. *Leisure & Hospitality* showed a loss of 260 jobs with most tourism jobs ending for the summer season. *Government Education* showed the only significant increase with schools returning to the regular season, an increase of almost 400. Year-over-year, *Nonfarm Payroll Jobs* increased 2,260

with *Service-Providing Industries* accounting for 1,700 and *Goods-Producing Industries* providing the other 560. *Construction* was up 610 jobs, with activity staying prevalent throughout the LMA and other counties. *Professional & Business Services* was up 500, followed by *Leisure & Hospitality* at 380 jobs, *Educational & Health Services* at 350 jobs, and *Retail Trade* at 310 jobs. Other increases can be noted, but were not as significant. Of the few decreases, only the *Food Manufacturing* sector under the *Manufacturing* industry is noteworthy, which showed a loss of 130 jobs year-over-year.

AREA DEVELOPMENTS

Bonneville County

- Aussie Eats, an Australian restaurant owned by native Brian Hall, opened a second location in Ammon on the corner of Hitt and Sunnyside Roads in the Chevron Station. Along with its other location at 552 North Capital Avenue in Idaho Falls, the restaurant serves meat pies, sausage rolls, and other Australian foods. The new location even offers English-style fish and chips. Ammon also opens for breakfast; hours are 7:00 a.m. to 9:00 p.m.
- The Red Lion Hotel in Idaho Falls on the Snake River, formerly known as WestCoast, Holiday Inn, and Westbank, will soon see another name. The WestCoast Hospitality Corporation, which purchased the Red Lion chain in 2001, is selling several northwest properties in addition to the Idaho Falls hotel. A new owner will most likely be named by the end of 2005.
- The Grand Teton Mall held its grand reopening in November to show off its new multi-million dollar face lift. The renovation started in June and the mall now sports new tile, a new ceiling, family room-style seating, a large play area for children, new facades and signage on entrances, new landscaping, and bike racks. The owner, General Growth Properties, also added the Grand Teton Plaza adjacent to the mall. It includes Ross Dress for Less, PetSmart, Best Buy, and will soon have a Linens 'n Things in operation. The space formerly leased to JJ North's restaurant is available.

Madison County

- The Rexburg local Idaho Commerce & Labor office (formerly known as the Job Service office) moved to its new location at 1133 Stocks Avenue, diagonally across from Artco, in mid-December. The office has increased customer service space and larger conference rooms, which are available for commerce- and labor-related business by reservation. The P. O. Box number (P.O. Box 158) and phone number (557-2501) will remain the same. For more information or directions, call 557-2501.

- Melaleuca Inc. announced plans to double its Rexburg operation to accommodate up to 900 jobs. The company's plan to add 266 desks to the 202 desks already at the location, which will allow part-time and full-time workers to use the desks to capacity. The location in Rexburg started with about 200 workers in January 2001 and had almost 450 workers by November 2004. Nearly 75 percent of these are part-time workers, which has been an advantage for the employer and employees. Most of the employees are Brigham Young University – Idaho students, hired for their bi-lingual abilities. Spanish and French are frequently used languages at the call center. The employees can pursue their education while holding a job that allows them to interact with customers from around the globe. Workers also have the opportunity to move up with the company after finishing their education. The company manufactures and distributes health and beauty aides, cleaning products, and other items. It also has locations in Idaho Falls and Tennessee.
- The Rexburg Gymnastics Center opened in Rexburg at the former United Furniture Warehouse on North Second East in October. The center offers noncompetitive gym programs for toddlers 18 months of age through teens. The gym focuses on developing talent, skills, and exercising that is fun. It also offers the United States of America Gymnastics Association's courses for strength training, stretching, and exercising. The center opened with 100 students, but has capacity for up to 700.
- AmericInn is opening the first week of January 2005 with about 40 employees. With close to 70 rooms, the facility will accommodate many of Rexburg's visitors and has two large conference rooms that can seat 120 and 150 people, respectively. The lodge offers continental breakfast, high-speed Internet access, an exercise room, an indoor pool, and a few whirlpool suites and specialty theme suites. Children aged 12 and under stay free. It is located at the south Rexburg exit off Highway 20, at 1098 Golden Beauty Drive.
- Big O Tires recently opened in Rexburg at 710 North Second East. A small burger stand was moved for construction of the building. The store employs six full-time workers and another six part-time workers. Big O Tires also has more than 10 stores throughout Idaho with two in Idaho Falls.

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A LOOK AT RETAIL TRADE—PART II

Employment Structure

A more complete employment picture of Idaho's *Retail Trade* industry is presented in FYI Table 1 on page 24. This table includes only those employers and employees covered by the state's Unemployment Insurance law. There are retail merchants who are not covered because they do not pay enough in wages to meet UI coverage requirements. These would include, among others, self-employed vendors, "outside" sales persons working on commissions only, sales ventures that occur sporadically (for example, at a fair, special event, etc.).

Table 1 data (page 24) shows that the top three industries in terms of 2003 average employment were:

- General Merchandise Stores
- Food & Beverage Stores
- Motor Vehicle & Parts Dealers

Other General Merchandise Stores gained the most employment between 1998 and 2003. *Grocery Stores* lost the most employment during the same period.

There were more *Motor Vehicle & Parts Dealers* employers/business establishments in 2003 than any other industry. *Miscellaneous Retail Stores* ranked second, and *Building Material & Garden Equipment & Supplies Stores* was third.

The rate of employment growth between 1998 and 2003 occurred in *Other General Merchandise Stores*. *Health & Personal Care Stores* grew the second fastest, and *Automotive Parts, Accessories, & Tire Stores* was third.

The number of businesses increased at the greatest rate in *Specialty Food Stores*, followed by *Electronic Shopping & Mail-Order Houses*, and *Gas Stations*.

RETAIL ESTABLISHMENT SIZE

Each month, a U.S. Bureau of Labor Statistics survey asks employers to report employment by establishment or each business site. Most, but not all, employers voluntarily comply with this request. Since *Retail Trade* is an industry in which it is common to have a chain-store structure, this reporting is especially important.

FYI Table 2 (below) presents average employment by size of the retail establishment and per-

FYI Table 2: Retail Trade, Average Employment and Employers by Size of Firm

Size by Average Employment	1993		1998		2003		1993 - 2003 Percent Chg	
	Avg Emp	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp	Employers
Total	58,135	5,251	69,652	5,847	73,132	5,848	25.8	11.4
INA	179	320	272	462	226	515	26.1	60.7
1 - 4	4,898	2,008	5,143	2,156	4,789	2,038	-2.2	1.5
5 - 9	9,590	1,456	10,008	1,500	10,274	1,542	7.1	5.9
10 - 19	11,034	854	12,845	980	12,922	988	17.1	15.6
20 - 49	12,237	413	13,868	489	13,799	480	12.8	16.3
50 - 99	7,921	116	10,877	156	13,073	186	65.0	60.3
100 - 249	11,251	83	13,458	99	11,284	80	0.3	-3.6
250 or more*	1,198	2	3,182	6	7,030	20	486.8	900.0

Cells might not add to total due to averaging and rounding.

*Disclosure suppression. Cell includes sizes 500-999 and 1000+

Source: Idaho Commerce and Labor, Covered Employment and Wages, November 2004

centage changes from 1993 to 2003. As can be noted from the table:

- Both the number of establishments and average employment in the smallest size categories (less than 10 employees) has remained relatively static during the ten-year period. On the other hand, these small businesses dominate the size of firm category with over 61 percent of the total number of retail stores.
- The number of stores with 250 or more employees increased by only 18 establishments in Idaho. However, the number of employees increased by 5,832, which was 38.9 percent of the total increase of 14,997 in all retail workers between 1993 and 2003.
- Except for the very large establishments, stores with 50-99 employees had the highest growth rates in average employment and number of employers.

FYI Table 3 (below) compares the *Retail Trade* employment and establishment structure to the same categories for all covered employment.

Retail Trade businesses with fewer than 50 employees per business establishment employ 57.1 percent of all of the industry's workers. Such businesses include 76.4 percent of all *Retail Trade* stores. Similar size businesses establishment comprise 49.9 percent of total covered employment and 81.2 percent of the business sites.

Large employers (100 or more average employment) number less than two percent of the *Retail Trade* and total covered business yet employ 25 percent of the *Retail Trade* employees and 35.4 percent of all covered workers.

"BIG BOX" VS. "MOM & POP"

Idaho has experienced a moderate infusion of large retail stores, usually part of a national or multi-state chain. Names such as Wal-Mart, Home Depot, Costco, Barnes & Noble, Target, ShopKo, and Best Buy have recently become in-state competitors to existing large stores such as Sears, JC Penney, K-Mart, Fred-Meyer, and the Bon-Macy's. Now these stores are found in almost all the larger Idaho cities and have further enhanced these places as regional shopping centers.

The supermarket concept is not new to Idaho. In fact, the modern day model of the large grocery store was pioneered in Idaho in 1939 when J.R. Albertson opened his first Albertson's grocery center in Boise. At the time, his store was much larger than most combined food departments under one roof, and had many more employees than was the norm. Since that time, Albertson's has grown into one of the nation's largest grocery store chains with sales of about \$35 billion, 230,000 employees, and 2,500 stores in 37 states.

Even Albertson's has had competition within Idaho as there are other large, medium, and small sized grocery stores throughout the state. As FYI

FYI Table 3: Retail Trade Compared to Total Average Employment and Employers by Size of Firm

Business Size by Average Employment	Retail Trade				All Employment & Employers			
	Avg Emp	% of Total	Employers	% of Total	Avg Emp	% of Total	Employers	% of
Total	73,132		5,848		576,025		48,365	
INA	226	0.3	515	8.8	2,060	0.4	7,165	14.8
1 - 4	4,789	6.5	2,038	34.9	43,911	7.6	21,017	43.5
5 - 9	10,274	14.0	1,542	26.4	57,831	10.0	8,804	18.2
10 - 19	12,922	17.7	988	16.9	75,428	13.1	5,698	11.8
20 - 49	13,799	18.9	480	8.2	110,674	19.2	3,731	7.7
50 - 99	13,073	17.9	186	3.2	82,220	14.3	1,218	2.5
100 - 249	11,284	15.4	80	1.4	76,548	13.3	530	1.1
250 or more*	7,030	9.6	20	0.3	127,354	22.1	203	0.4

Cells might not add to total due to averaging and rounding.

Source: Idaho Commerce and Labor, Covered Employment and Wages, November 2004

Table 4 shows (page 25), the number of employers and number of employees by size categories has not changed much between 1993 and 1998. A couple of chain stores left the state, convenience stores have expanded their product lines, and many medium sized stores have remodeled and joined buying associations in order to remain competitive.

The question of whether or not the “big box” retail store has put the “mom and pop” store out of business is not centered on the grocery business in Idaho. That is not to say that individual small grocery stores have not suffered from the presence of large supermarkets, because some have. Yet small grocery stores (maybe transformed into convenience stores that do not sell gasoline) have survived in some areas of the state.

The best example of the large retail store gaining a stronger presence—as measured by employment growth—is in *Building Material & Garden Equipment & Supplies Dealers*. Stores with 100 or more employees increased their total average employment count by 519 percent from 1993 to 2003. Smaller-sized stores still prospered, but the real growth occurred through the introduction of the big box retail stores. Home Depot and Lowe’s Building Centers are two examples.

Large *General Merchandise Stores* (examples: The Bon-Macy, Dillards, JC Penney, Sears, ShopKo, Target, Fred Meyer, Wal-Mart, Rite Aid) added the most workers. Stores with 100+ average employment added 3,568 workers during the ten-year period. Although the number of smaller stores increased between 1993 and 2003, the smaller-sized categories added just 1,365 employees.

The *Merchandise* category that offers some evidence of the large store hurting the small store is in *Clothing & Clothing Accessories Stores*. Both the number of stores and average employment in the size category of 10-99 employees declined between 1998

and 2003. Although it is possible one or more of these stores moved into the large store category, it is unlikely since there are too few establishments in the large store category to publish any data. There have been several news reports of hometown clothing stores closing after many years of business. Often these stores have been located in smaller towns that

were facing increased competition from growing regional shopping centers of larger cities nearby. This is not necessarily a result of big box competition, but the increased urbanization of Idaho cities.

In summary, the introduction of the big box retailers in certain *Merchandise* categories has increased, or at least somewhat centralized, employment. It is likely average employment would have increased anyway be-

cause of Idaho’s population growth. Continued growth of most of the smaller stores in the selected industries included in FYI Table 4 (page 25) supports this notion. So one conclusion is the big box retailer has had an employment impact in Idaho, but not necessarily at the expense of the smaller retailer. The smaller retail stores still exist and, for the most part, have grown.

WHAT CHARACTERIZES A BIG BOX RETAILER?

- Typically occupies more than 50,000-square feet, with typical ranges between 90,000-200,000-square feet.
- Derives profits from high sales volumes rather than price mark up.
- Large, windowless, rectangular single-story buildings with standardized facades.
- Acres of parking; reliance on auto-borne shoppers.
- No-frills site development with no community or pedestrian amenities.
- Varying market niches; categories include discount department stores and warehouse clubs.

(adapted from a report from the Columbia University Graduate School of Architecture, Preservation, and Planning, 2001)

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FYI Table 1: Retail Trade, Average Employment and Employers

	1998		2003		1998-2003 Numerical Change		1998-2003 Percent Change	
					Avg Emp	Employers	Avg Emp	Employers
44 RETAIL TRADE	69,652	5,847	73,132	5,848	3,480	1	5.00	0.00
441 Motor Vehicle and Parts Dealers	9,915	810	10,815	855	901	46	9.08	5.62
4411 Automobile Dealers	5,856	296	6,214	313	359	17	6.12	5.84
4412 Other Motor Vehicle Dealers	1,080	168	1,386	178	306	11	28.34	6.42
4413 Automotive Parts, Accessories, and Tire Stores	2,979	347	3,215	364	236	18	7.93	5.05
442 Furniture and Home Furnishings Stores	2,380	381	2,387	315	7	(67)	0.31	(17.51)
4421 Furniture Stores	1,216	175	1,282	138	66	(37)	5.45	(21.26)
4422 Home Furnishings Stores	1,164	206	1,105	177	(59)	(30)	(5.06)	(14.32)
443 Electronics and Appliance Stores	2,229	356	2,508	374	278	18	12.48	5.06
4431 Electronics and Appliance Stores	2,229	356	2,508	374	278	18	12.48	5.06
444 Building Material and Garden Equipment and Supplies Dealers	6,736	619	7,660	647	925	27	13.73	4.40
4441 Building Material and Supplies Dealers	5,520	491	6,310	497	790	6	14.30	1.17
4442 Lawn and Garden Equipment and Supplies Stores	1,215	129	1,350	150	135	22	11.11	16.73
445 Food and Beverage Stores	15,595	701	12,774	618	(2,821)	(83)	(18.09)	(11.78)
4451 Grocery Stores	13,802	512	10,701	392	(3,101)	(119)	(22.47)	(23.31)
4452 Specialty Food Stores	1,477	144	1,727	179	251	36	16.99	24.91
4453 Beer, Wine, and Liquor Stores	317	46	346	47	29	1	9.16	2.20
446 Health and Personal Care Stores	2,014	281	2,823	304	809	23	40.15	8.29
4461 Health and Personal Care Stores	2,014	281	2,823	304	809	23	40.15	8.29
447 Gasoline Stations	4,820	491	5,162	556	342	65	7.10	13.23
4471 Gasoline Stations	4,820	491	5,162	556	342	65	7.10	13.23
448 Clothing and Clothing Accessories Stores	3,639	536	3,722	497	83	(40)	2.29	(7.37)
4481 Clothing Stores	2,428	311	2,707	287	278	(24)	11.47	(7.64)
4482 Shoe Stores	598	116	474	99	(124)	(17)	(20.69)	(14.50)
4483 Jewelry, Luggage, and Leather Goods Stores	613	110	541	111	(72)	1	(11.67)	0.91
451 Sporting Goods, Hobby, Book, and Music Stores	3,960	488	4,206	477	245	(11)	6.19	(2.15)
4511 Sporting Goods, Hobby, and Musical Instrument Stores	2,954	384	3,129	383	174	(1)	5.90	(0.26)
4512 Book, Periodical, and Music Stores	1,006	104	1,077	94	71	(10)	7.07	(9.18)
452 General Merchandise Stores	11,769	228	15,145	250	3,377	23	28.69	9.89
4521 Department Stores	5,102	50	4,780	56	(322)	7	(6.32)	13.13
4529 Other General Merchandise Stores	6,667	178	10,365	194	3,699	16	55.48	8.99
453 Miscellaneous Store Retailers	4,632	766	4,512	764	(120)	(1)	(2.60)	(0.16)
4531 Florists	677	136	609	129	(68)	(8)	(10.01)	(5.69)
4532 Office Supplies, Stationery, and Gift Stores	1,673	220	1,709	240	37	20	2.20	8.99
4533 Used Merchandise Stores	536	107	563	103	27	(5)	5.04	(4.20)
4539 Other Miscellaneous Store Retailers	1,747	302	1,631	294	(116)	(9)	(6.66)	(2.89)
454 Nonstore Retailers	1,964	193	1,419	192	(545)	(1)	(27.75)	(0.39)
4541 Electronic Shopping and Mail- Order Houses	871	33	444	40	(428)	7	(49.10)	21.21
4542 Vending Machine Operators	132	29	98	24	(34)	(5)	(25.91)	(17.24)
4543 Direct Selling Establishments	961	131	878	128	(83)	(3)	(8.64)	(2.11)

Note: Totals might not add due to averaging and rounding

Source: Idaho Commerce & Labor, Covered Employment & Wages, November 2004

FYI Table 4: Selected Retail Trade Employers and Average Employment								
Size of Retail Stores by Avg. Employment	442 Furniture and Home Furnishings Stores							
	1993		1998		2003		93-03 Pct. Chg.	
	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp
All Size Classes*	325		381	2,380	315	2,387	(3.1)	16.4
INA	25		46	8	30	5	16.8	(42.6)
1 - 9	233	904	255	917	219	850	(6.0)	(6.0)
10 -99	66	1,139	81	1,455	66	1,269	(1.1)	11.4
Over 100					suppressed			
	443 Electronics and Appliance Stores							
	1993		1998		2003		93-03 Pct. Chg.	
	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp
All Size Classes*	261	1,595	356	2,229	374	2,508	43.1	57.2
INA	21	9	40	15	46	8	122.9	(15.0)
1 - 9	194	673	259	902	270	974	39.2	44.7
10 -99	46	831	57	1,220	57	1,358	22.2	63.3
Over 100	suppressed		suppressed		suppressed		suppressed	
	444 Building Material and Garden Equipment and Supplies Dealers							
	1993		1998		2003		93-03 Pct. Chg.	
	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp
All Size Classes*	510	5,215	619	6,736	647	7,660	26.8	46.9
INA	22	11	36	23	52	13	140.2	9.5
1 - 9	310	1,366	364	1,555	379	1,645	22.3	20.4
10 -99	176	3,540	215	4,389	202	4,164	14.8	17.6
Over 100	suppressed		5	769	13	1,840	410.0	518.5
	445 Food and Beverage Stores							
	1993		1998		2003		93-03 Pct. Chg.	
	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp
All Size Classes*	610	12,940	701	15,595	618	12,774	1.4	(1.3)
INA	28	27	42	73	37	28	32.7	1.2
1 - 9	318	1,455	363	1,680	308	1,396	(3.2)	(4.0)
10 -99	241	7,704	261	8,581	253	8,883	5.3	15.3
Over 100	23	3,754	34	5,261	20	2,467	(13.0)	(34.3)
	448 Clothing and Clothing Accessories Stores							
	1993		1998		2003		93-03 Pct. Chg.	
	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp
All Size Classes*	623	3,847	536	3,639	497	3,722	(20.3)	(3.2)
INA	34	20	41	25	48	24	40.1	23.1
1 - 9	485	2,082	397	1,780	361	1,633	(25.5)	(21.5)
10 -99	105	521	97	1,735	85	1,456	(19.1)	179.3
Over 100			suppressed		suppressed		suppressed	
	452 General Merchandise Stores							
	1993		1998		2003		93-03 Pct. Chg.	
	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp	Employers	Avg Emp
All Size Classes*	210	10,260	228	11,769	250	15,145	18.9	47.6
INA	7	6	6	5	10	52	53.8	774.6
1 - 4	59	265	65	332	63	337	6.3	26.9
10 -99	99	3,283	106	3,489	132	4,576	34.3	39.4
Over 100	47	6,877	51	7,943	45	10,445	(3.7)	51.9
Suppressed because of 3 or less firms in cell								
*Total might not add due to averaging and rounding								
Source: Idaho Commerce & Labor, Covered Employment & Wages, October 2004								

Franklin County

- Construction was completed in October on the Preston City maintenance building. Items from the old fire station, adjacent to city hall, will be moved into the new building. Once those items have been moved, the city will immediately begin demolition of the old fire station.
- It Fitz, a specialty bag/carrying case manufacturing company, is moving its operation from Richmond, Utah, to the Franklin City area. Construction is underway on a new facility, which will increase the manufacturing area as well as provide space for storing, displaying, and selling the company's products.

Oneida County

- Total Health & Fitness opened in Malad with a grand opening celebration. The center offers a total

body workout with a full line of cardio, free weights, and machine weight systems.

Power County

- A new Family Dollar store was built and opened on Harrison Street in American Falls. Three building were demolished to make room to build the new store. The business not only provides new jobs, but also provides improved shopping opportunities and enhances the downtown area.

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STATE OVERVIEW — (continued from page 4)

State Table 5: Retail Trade, Average Employment and Employers

	1998				2003				1998 - 2003		2003
	Number		Percent of Total		Number		Percent of Total		Percent Change		Avg. Emp.
	Avg Emp	Em- ployers	Avg Emp	Em- ployers	Avg Emp	Em- ployers	Avg Emp	Em- ployers	Avg Emp	Em- ployers	per Em- ployer
Total Covered Employment	524,590	43,140			576,025	48,365			9.8	12.1	
Total Retail Trade	69,652	5,847	13.28	13.55	73,132	5,848	12.70	12.09	5.0	0.0	12.5
			Percent of Retail Trade				Percent of Retail Trade				
441 Motor Vehicle and Parts Dealers	9,915	810	14.23	13.85	10,815	855	14.79	14.63	9.1	5.6	12.6
442 Furniture and Home Furnishings Stores	2,380	381	3.42	6.52	2,387	315	3.26	5.38	0.3	-17.5	7.6
443 Electronics and Appliance Stores	2,229	356	3.20	6.08	2,508	374	3.43	6.39	12.5	5.1	6.7
444 Building Material and Garden Equipment and Supplies Dealers	6,736	619	9.67	10.59	7,660	647	10.47	11.06	13.7	4.4	11.8
445 Food and Beverage Stores	15,595	701	22.39	11.98	2,774	618	17.47	10.57	-18.1	-11.8	20.7
446 Health and Personal Care Stores	2,014	281	2.89	4.80	2,823	304	3.86	5.19	40.1	8.3	9.3
447 Gasoline Stations	4,820	491	6.92	8.40	5,162	556	7.06	9.51	7.1	13.2	9.3
448 Clothing and Clothing Accessories Stores	3,639	536	5.22	9.17	3,722	497	5.09	8.49	2.3	-7.4	7.5
451 Sporting Goods, Hobby, Book, and Music Stores	3,960	488	5.69	8.34	4,206	477	5.75	8.16	6.2	-2.2	8.8
452 General Merchandise Stores	11,769	228	16.90	3.89	15,145	250	20.71	4.28	28.7	9.9	60.6
453 Miscellaneous Store Retailers	4,632	766	6.65	13.09	4,512	764	6.17	13.07	-2.6	-0.2	5.9
454 Nonstore Retailers	1,964	193	2.82	3.29	1,419	192	1.94	3.28	-27.7	-0.4	7.4

Numbers may not add due to averaging and rounding

Source: Idaho Commerce and Labor, Covered Employment and Wages, November 2004

Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Labor Market Area (LMA): An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

Metropolitan Statistical Area (MSA): An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a

total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are five MSAs in Idaho—Boise City-Nampa MSA (including Ada and Canyon Counties), Coeur d’Alene MSA (Kootenai County), Idaho Falls MSA (Jefferson and Bonneville Counties), Lewiston MSA (Nez Perce County in Idaho and Asotin County in Washington), Logan MSA (Franklin County and the Logan, Utah, Metro Area), and Pocatello City (Bannock County).

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.